

# **Chapter 4**

## **Class Copy Functions**

**MICHIGAN  
ADULT EDUCATION  
REPORTING SYSTEM  
[MAERS]**

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## Chapter 4 – Class Copy Functions

In this chapter you will learn the following:

[Section 4.0](#) – Where to find Class Copy Functions

[Section 4.1](#) – Copy Instructors into the Next Program Year

[Section 4.2](#) – Copy Locations into the Next Program Year

[Section 4.3](#) – Copy Courses into the Next Program Year

[Section 4.4](#) – Copy Classes with Enrolled Participants into the Next Program Year

[Section 4.5](#) – Copy Classes without Participants into the Next Program Year

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### Section 4.0 – Where to find Class Copy Functions

Class Copy functions are found in the **Provider Admin** tab. (Image 4.0a)

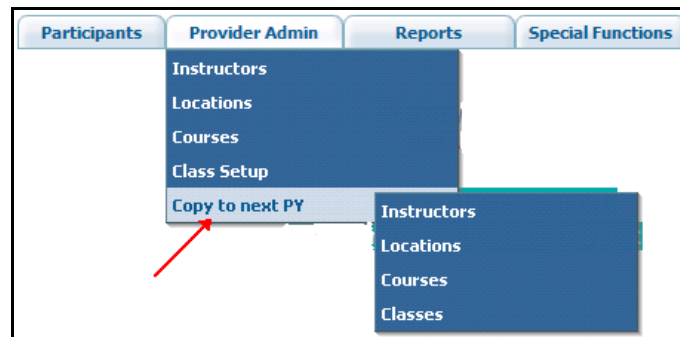


Image 4.0a

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### Section 4.1 – Copy Instructors into the Next Program Year

Click on the [Copy to next PY](#) link within the **Provider Admin** tab, and then click on the [Instructors](#) link. Current Instructors can be copied from the prior program Year between the dates of April 1<sup>st</sup> of the current Program Year to March 31<sup>st</sup> of the following Program Year.

**Instructor Copy**

1 →

From/To Program Year:	Provider:
2011-2012	AURA LEARNING (Code: T0002)

2 →

Show 10 entries

Search:

Row#	Instructor	Local Instructor No	Instr. Areas	Position	Status	Copy?
1.	LEE, LARRY	AL-0005	ABE	Full Time	Active	<input checked="" type="checkbox"/>
2.	PHELPS, PAUL	AL-0007	ESL	Unpaid Volunteer	Active	<input checked="" type="checkbox"/>
3.	STEWART, SALLY	AL-0006	HSD, GED	Part Time	Active	<input type="checkbox"/>

Showing 1 to 3 of 3 entries

Copy to clipboard   Export to Excel   Export to PDF   Print

First Previous 1 Next Last

3 →

4 →

Submit   New Search   Cancel

**Image 4.1a**

1. The header will provide the current year and next Program Year information
2. To view or update a current Instructor record, click on the [Instructor Name](#) link from the Instructor column
3. To copy an Instructor record into the next Program Year, check the **Copy** box. Multiple records can be copied at one time.
4. Click **Submit** to copy the record into the new Program Year (Image 4.1a)

Copying a record into the next Program Year will always navigate to a **Search Results** screen. This allows the record to then be updated and activated as needed. (Image 4.1b)

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**Instructor Search Results**

• Copied a total of 2 out of 2 selected Instructor records from PY: 2011 to PY: 2012. All these are in Inactive status until each record is reviewed and approved.

1 →

Program Year:	Provider:
2012-2013	AURA LEARNING (Code: T0002)

2 →

Click on the 'Instructor' column to update the existing Instructor record.

3 →

Show 10 entries

Search:

Row#	Instructor	Local Instructor No	Instr. Areas	Position	Status
1.	JOHNS, JOHN	T001	GED	Unpaid Volunteer	Active
2.	LEE, LARRY	AL-0005	ABE		Inactive
3.	MILLER, MARY	T002	ABE, HSD, GED	Full Time	Active
4.	PHELPS, PAUL	AL-0007	ESL		Inactive
5.	WALTERS, WILLIAM	T003	ABE, ESL	Part Time	Active

Showing 1 to 5 of 5 entries

Copy to clipboard   Export to Excel   Export to PDF   Print

First Previous 1 Next Last

5 →

Add Instructor   New Search

**Image 4.1b**

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1. A confirmation message regarding the copied records is displayed
2. The header will provide the Program Year to which the record has been copied
3. The **Status** column displays those records that need to be activated
4. To view and activate the new Program Year record, click on the [Instructor Name](#) link from the **Instructor** column. This allows you to view and update the Status to Active. When the record is updated, the system will navigate back to the **Search Results** screen so other records can be activated if needed. See [Chapter 2](#), Class Functions; Section 2.2, Instructor Data Entry.
5. To Add a new Instructor, refer to [Chapter 2](#), Class Functions; Section 2.2, Instructor Data Entry

Notes:

- Multiple Instructor records can be copied at one time. However, only one record can be updated at one time.
- When copying an Instructor record, all data fields will be prefilled with the exception of Instructional Experience. This field will only prefill if the previous year entry was **More than three years**. Although data copies over, the Instructor Status still needs to be set to Active to be used in a Class. All other information should be updated as needed.

## Section 4.2 – Copy Locations into the Next Program Year

Click on the [Copy to next PY](#) link within the **Provider Admin** tab, and then click on the [Locations](#) link. Current Locations can be copied from the prior program year between the dates of April 1<sup>st</sup> of the current Program Year to March 31<sup>st</sup> of the following Program Year.

The screenshot shows the 'Location Copy' interface. At the top, there are two input fields: 'From/To Program Year:' with the value '2011-2012' and 'Provider:' with the value 'AURA LEARNING (Code: T0002)'. Below these is a table with columns: Row#, Location, Primary Contact, Contact Phone, Mailing Address, Status, and Copy?. The table contains two rows of data. Below the table are buttons for 'Copy to clipboard', 'Export to Excel', 'Export to PDF', and 'Print'. At the bottom, there are buttons for 'Submit', 'New Search', and 'Cancel'. Red arrows with numbers 1 through 4 point to specific elements: 1 points to the 'From/To Program Year' field, 2 points to the 'Location' column header, 3 points to the 'Copy?' column header, and 4 points to the 'Submit' button.

Row#	Location	Primary Contact	Contact Phone	Mailing Address	Status	Copy?
1.	AURA SENIOR CENTER	LUTZ, LINDA	(517) 555-1111	111 Aura Center Lansing, MI 48913	Active	<input checked="" type="checkbox"/>
2.	AURA COMMUNITY HALL	LUTZ, LINDA	(517) 555-1111	555 Center St Lansing, MI 48913	Active	<input checked="" type="checkbox"/>

Image 4.2a

1. The header will provide the current year and next Program Year information
2. To view or update the current years Location record, click on the [Location Name](#) link from the **Location** column
3. To copy a Location record into the next Program Year, check the **Copy** box. Multiple records can be copied at one time.
4. Click **Submit** to copy the record into the new Program Year (Image 4.2a)

Copying a record into the next Program Year will always navigate to a **Search Results** screen. This allows the record to then be updated and activated as needed. (Image 4.2b)

**Location Search Results**

• Copied a total of 2 out of 2 selected Location records from PY: 2011 to PY: 2012. All these are in Inactive status until each record is reviewed and approved.

Program Year:	Provider:
2012-2013	AURA LEARNING (Code: T0002)

Click on the 'Location' column to update the existing Location record.

Copy to clipboard   Export to Excel   Export to PDF   Print

Show 10 entries   Search:

Row#	Location	Primary Contact	Contact Phone	Mailing Address	Status
1.	AURA LEARNING CENTER 1	JOHNS, JOHN	(517) 555-1212	111 Center Lansing, MI 48913	Active
2.	AURA COMMUNITY CENTER 1	KIMMERS, KIM	(989) 642-3333	11240 Swan Creek Lansing, MI 48913	Active
3.	AURA HIGH SCHOOL 1	KLINE, KERRY	(989) 642-1111	111130 Brennan Rd Lansing, MI 48913	Active
4.	AURA SENIOR CENTER	LUTZ, LINDA	(517) 555-1111	111 Aura Center Lansing, MI 48913	Inactive
5.	AURA COMMUNITY HALL	LUTZ, LINDA	(517) 555-1111	555 Center St Lansing, MI 48913	Inactive

Showing 1 to 5 of 5 entries   First   Previous   1   Next   Last

Add Location   New Search

**Image 4.2b**

1. A confirmation message regarding the copied records is displayed
2. The header will provide the Program Year to which the record has been copied
3. The **Status** column displays the records that need to be activated
4. To view and activate the new Program Year record, click on the [Location Name](#) link from the **Location** column. This allows you to view and update the Status to Active. When the record is updated, the system will navigate back to the **Search Results** screen so other records can be activated if needed. See [Chapter 2](#), Class Functions; Section 2.3, Location Data Entry.
5. To add a new Location, refer to [Chapter 2](#), Class Functions; Section 2.3, Location Data Entry

**Notes:**

- Multiple Location records can be copied at one time. However, only one record can be updated at one time.
- When copying a Location record, all data fields will prefill. Although data copies over, the Location Status still needs to be set to Active to be used in a Class. All other information should be updated as needed.

## Section 4.3 – Copy Courses into the Next Program Year

Click on the [Copy to next PY](#) link within the **Provider Admin** tab, and then click on the [Courses](#) link. Current Courses can be copied from the prior program year between the dates of April 1<sup>st</sup> of the current Program Year to March 31<sup>st</sup> of the following Program Year.

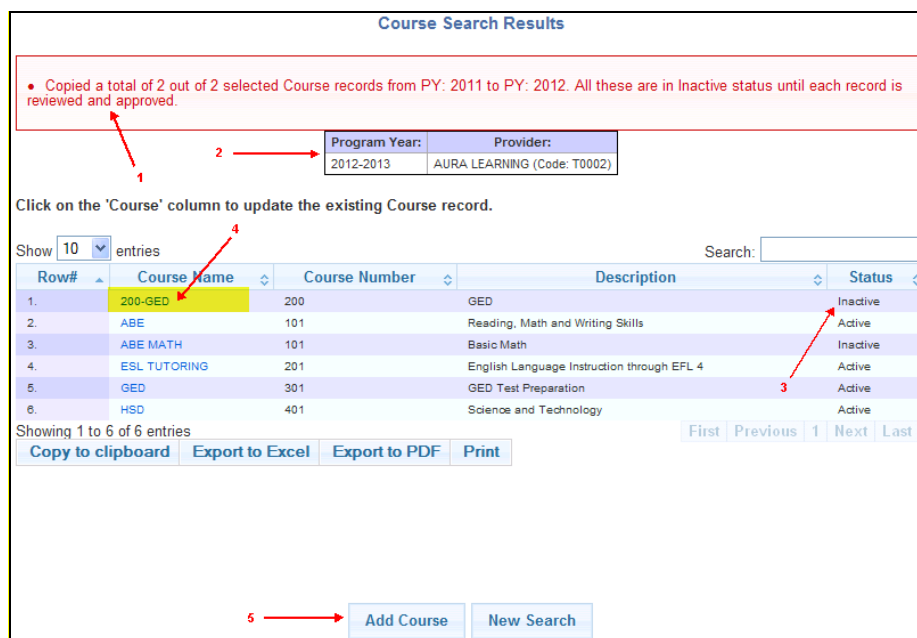
The screenshot shows the 'Course Copy' interface. At the top, a box contains 'From/To Program Year: 2011-2012' and 'Provider: AURA LEARNING (Code: T0002)'. Below this is a table with columns: Row#, Course Name, Course Number, Description, Status, and Copy?. The table lists two courses: '200-GED' and 'ABE MATH'. The 'Copy?' column has checkboxes for each. Below the table are buttons for 'Copy to clipboard', 'Export to Excel', 'Export to PDF', and 'Print'. At the bottom are 'Submit', 'New Search', and 'Cancel' buttons. Red arrows with numbers 1 through 4 point to specific elements: 1 points to the 'From/To Program Year' box, 2 points to the 'Course Name' column header, 3 points to the 'Copy?' checkbox for 'ABE MATH', and 4 points to the 'Submit' button.

Row#	Course Name	Course Number	Description	Status	Copy?
1.	200-GED	200	GED	Active	<input checked="" type="checkbox"/>
2.	ABE MATH	101	Basic Math	Active	<input checked="" type="checkbox"/>

**Image 4.3a**

1. The header will provide the current year and next Program Year information
2. To view or update the current years Course record, click on the [Course Name](#) link from the **Course Name** column
3. To copy a Course record into the next Program Year, check the **Copy** box. Multiple records can be copied at one time.
4. Click **Submit** to copy the record into the new Program Year (Image 4.3a)

Copying a record into the next Program Year will always navigate to a **Search Results** screen. This allows the record to then be updated and activated as needed. (Image 4.3b)



**Image 4.3b**

1. A confirmation message regarding the copied records is displayed
2. The header will provide the Program Year to which the record has been copied
3. The **Status** column displays those records that need to be activated
4. To view and activate the new Program Year record, click on the [Course Name](#) link from the **Course Name** column. This allows you to view and update the Status to Active. When the record is updated, the system will navigate back to the **Search Results** screen so other records can be activated if needed. See [Chapter 2](#), Class Functions; Section 2.4, Course Data Entry.
5. To add a new Course, refer to [Chapter 2](#), Class Functions; Section 2.4, Course Data Entry

*Notes:*

- *Multiple Course records can be copied at one time. However, only one record can be updated at one time.*
- *When copying a Course record, all data fields will prefill. Although data copies over, the Course Status still needs to be set to Active to be used in a Class. All other information should be updated as needed.*

## Section 4.4 – Copy Classes with Enrolled Participants into the Next Program Year

To copy a class to the next Program Year, the Instructors, Location, and Courses must to be copied from the prior Program Year first or new records created. Once this is completed, then classes can be copied. Refer to Chapter 4, Class Copy Functions; [Sections 4.1](#), [4.2](#), and [4.3](#).

Click on the [Copy to next PY](#) link within the **Provider Admin** tab, and then click on the [Classes](#) link. A Program Year and filter screen is displayed. (Image 4.4a) Since classes can only be copied between specific dates, the **From** and **To Program Year** dates will prefill.

**Copy Classes - Pick Program Year**

Select the Provider and click on 'Search'

➡ From Program Year: 2011

➡ To Program Year: 2012

➡ Provider Name/Code: AURA LEARNING (Code: T0002)

To narrow your result set, you may also select an Instructor, Location, or Course:

Class Instructor: Any Instructor

Class Location: Any Location

Course Name: Any Course

2 ➡ **Search**

**Image 4.4a**

1. To narrow the search results, select an active record from one or more of the available dropdown lists. To display all classes, leave the dropdown selections set to **Any**.
2. Click on **Search** to view the classes.

Classes with Enrolled Participants can only be copied from the previous program year beginning July 1<sup>st</sup> through July 31<sup>st</sup>.

To copy a class with Enrolled Participants, the following criteria must be met:

- The class must have an end date of June 30<sup>th</sup>
- One or more Participants must be actively enrolled in the class
- Attendance must be current for the active Participants through May
- A Pre-Test must be on file for the active Participants in the new program year

**Class Copy**

From/To Program Year:	Provider:
2011 -> 2012	AURA LEARNING (Code: T0002)

**Copy with Participants: Instructions**

To copy a Class forward into the next Program Year WITH its participants, you must first copy **and activate** Courses, Instructors, Locations, and Funding Sources from the previous Program Year (or setup new ones for next Program Year). Only Participants that meet all of the following criteria will be copied forward and will be enrolled into the new class:

- Active in the Class on June 30<sup>th</sup>; and,
- Attendance is up to date through May; and,
- A PRE Test in the same instructional area as that of the class has been entered for the new Program Year.

**Copy without Participants: Instructions**

To copy a Class forward into the next Program Year WITHOUT its participants, it is recommended that you first copy Courses, Instructors, Locations, and Funding Sources from the previous Program Year (or setup new ones for next Program Year). The copy function does the following:

- Copies the existing class' Course, Instructor, and Location information, provided they have already been copied forward into the new PY; and,
- Copies the Class Schedule; and,
- Copies the Class Term.

**Once your class is copied into the new PY, you then need to do the following:**

- Update the Class Status to Active
- Review and Approve the changes
- Select the Class Funding Sources
- Click update to save the record



#	Class Name - Class No	Description	Instructor	Location	Term	Status	Copy with Participants	Copy without Participants
1.	200-GED - 200 <a href="#">Edit Original Class</a>	GED	JOHNS, JOHN	LEARNING CENTER Room#: 112-A	Open Entry/Exit	Active	<input type="checkbox"/> <div>           Not Available:            - Class does not end June 30            - No active participants            - Course not active            - Location not active         </div>	<input type="checkbox"/>
2.	200-GED - 200 <a href="#">Edit Original Class</a>	GED	JOHNS, JOHN	AURA SENIOR CENTER Room#:	Semester - Fall	Active	<input type="checkbox"/> <div>           Not Available:            - Class does not end June 30            - No active participants            - Course not active         </div>	<input type="checkbox"/>
3.	ABE MATH - 101 <a href="#">Edit Original Class</a>	Basic Math	LEE, LARRY	AURA SENIOR CENTER Room#:	Open Entry/Exit	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Image 4.4b**

1. The header will provide the current year and next Program Year information
2. Detailed instructions are displayed for Copy into Next PY with Participants and without Participants
3. For programs with multiple classes, a Search box is available
4. To view or update the previous year's Class record, click on the [Edit Original Class](#) link from the **Class Name** column
5. A check box is displayed under the Copy with Participants column if the class can be copied into the new Program Year. If a check box is not displayed, detailed reasons as to why the class cannot be copied with Participants is displayed.
6. To copy a Class record with Participants into the next Program Year, check the box within the **Copy with Participants** column. Only one record can be copied at a time.
7. Click **Submit** to create the new class record into the new Program Year (Image 4.4b)

• Class contains 3 Active Participants. Of these, (3) will be copied and enrolled into the new Class

Program Year:	Provider:	Class ID:	Number Enrolled:
2012-2013	AURA LEARNING (Code: T0002)	1078168296	3

Class Enrollments by Group  
Class Attendance by Group

**General Information** | Class Funding | Class Schedule | View Class Participants

Course: 101 - ABE MATH  
Capacity: 25  
Scheduled Hours: 120.00  
Instruction Method: Classroom / Distance Education  
Instructional Area: ABE  
Term: Open Entry/Exit  
Status: Inactive  
Record Created on: 07/23/2012 01:11:38 PM  
Record Last Updated on: 07/23/2012 01:11:38 PM  
Record Last Updated by: ADMINP

Instructor: LEE, LARRY  
Instructor #2:  
Instructor #3:  
Begin Date: 07/01/2012  
End Date: 06/30/2013  
Enrollment Cut Off Date: 06/30/2013  
Location: AURA SENIOR CENTER  
Room Number:

Reviewed and approved by for Program Year: 2012-2013

Update | Reset Form | Cancel

Save and Create New

Delete | Copy within PY

Next Tab »

**Image 4.4c**

1. A confirmation message regarding the copied record is displayed. If the Class was copied but the Participants could not be copied, the confirmation would provide a list of reasons. (Image 4.4c)
2. The header will display the Program Year to which the record has been copied
3. The class **Status** must be set to **Active**
4. The Class information on all tabs must be verified then the **Reviewed and Approved by** must be entered

Click **Next Tab** to move to the **Class Funding** tab. See [Chapter 2](#), Class Functions; Section 2.5, Setting Up Classes to complete the Class Setup. When the record is updated, the system will navigate back to the **Class Copy** screen so other class records can be copied if needed.

*Notes:*

- When copying a Class record, all data fields will prefill across tabs with the exception of the Class Funding. Funding is allocated on a Program Year schedule so this does need to be updated yearly for each Class. However, if the previous year's Instructor, Location, or Course for this class is not copied and activated first but other Instructors, Locations, or Courses have previously been activated for the new Program Year, these fields will be nullified with a dropdown selection to choose a different Instructor, Location, or Course. All other information should be updated as needed.

## Section 4.5 – Copy Classes without Participants into the Next Program Year

To copy a class to the next Program Year, the Instructors, Location, and Courses must to be copied from the prior Program Year first or new records created. Once this is completed, then classes can be copied. Refer to Chapter 4, Class Copy Functions; [Sections 4.1](#), [4.2](#), and [4.3](#).

Click on the [Copy to next PY](#) link within the **Provider Admin** tab, and then click on the [Classes](#) link. Current Classes can only be copied into the next Program Year between the dates of April 1<sup>st</sup> of the current Program Year to March 31<sup>st</sup> of the following Program Year.

To save a copied class record without Participants, the following criteria must be met:

- Active Instructors, Locations, and Courses must already be entered or copied from the previous program year

**Class Copy**

1 → **From/To Program Year:** 2011 → 2012      **Provider:** AURA LEARNING (Code: T0002)

**Copy with Participants: Instructions**

To copy a Class forward into the next Program Year WITH its participants, you must first copy **and activate** Courses, Instructors, Locations, and Funding Sources from the previous Program Year (or setup new ones for next Program Year). Only Participants that meet all of the following criteria will be copied forward and will be enrolled into the new class:

- Active in the Class on June 30th; and,
- Attendance is up to date through May; and,
- A PRE Test in the same instructional area as that of the class has been entered for the new Program Year.

**Copy without Participants: Instructions**

To copy a Class forward into the next Program Year WITHOUT its participants, it is recommended that you first copy Courses, Instructors, Locations, and Funding Sources from the previous Program Year (or setup new ones for next Program Year). The copy function does the following:

- Copies the existing class' Course, Instructor, and Location information, provided they have already been copied forward into the new PY; and,
- Copies the Class Schedule; and,
- Copies the Class Term.

**Once your class is copied into the new PY, you then need to do the following:**

- Update the Class Status to Active
- Review and Approve the changes
- Select the Class Funding Sources
- Click update to save the record

3 → Search:

#	Class Name - Class No	Description	Instructor	Location	Term	Status	Copy with Participants	Copy without Participants
1.	200-GED - 200 <a href="#">Edit Original Class</a>	GED	JOHNS, JOHN	LEARNING CENTER Room#: 112-A	Open Entry/Exit	Active	Not Available: - Class does not end June 30 - No active participants - Course not active - Location not active	<input type="checkbox"/>
2.	200-GED - 200 <a href="#">Edit Original Class</a>	GED	JOHNS, JOHN	AURA SENIOR CENTER Room#:	Semester - Fall	Active	Not Available: - Class does not end June 30 - No active participants - Course not active	<input checked="" type="checkbox"/>
3.	ABE MATH - 101 <a href="#">Edit Original Class</a>	Basic Math	LEE, LARRY	AURA SENIOR CENTER Room#:	Open Entry/Exit	Active	Not Available: - Class has already been copied into the next PY with its participants	<input type="checkbox"/>

7 →

**Image 4.5a**

1. The header will provide the current year and next Program Year information
2. Detailed instructions are displayed to Copy into Next PY with Participants and without Participants
3. For programs with multiple classes, a Search box is available
4. To view or update the current year's Class record, click on the [Edit Original Class](#) link from the **Class Name** column

5. A Class can be copied without Participants as many times as needed by the program. Example: If a program needs to offer five sections ABE Math 101 in a Program Year, the ABE Math 101 can be copied without Participants five times.
6. To copy a Class record without Participants into the next Program Year, check the **Copy without Participants** box. Only one record can be copied at a time.
7. Click **Submit** to create the new class record into the next Program Year (Image 4.5b)

**Image 4.5b**

1. A confirmation message regarding the copied record is displayed (Image 4.5b)
2. The header will display the Program Year to which the record has been copied
3. The class **Status** must be set to **Active**
4. The Class information on all tabs must be verified then the **Reviewed and Approved by** must be entered

Click **Next Tab** to move to the **Class Funding** tab. See [Chapter 2](#), Class Functions; Section 2.5, Setting Up Classes to complete the Class Setup. When the record is submitted, the system will navigate back to the **Class Copy** screen so other class records can be copied if needed.

*Notes:*

- When copying a Class record, all data fields will prefill across tabs with the exception of the Class Funding. Funding is allocated on a Program Year schedule so this does need to be updated yearly for each Class. However, if the previous year's Instructor, Location, or Course for this class is not copied and activated first but other Instructors, Locations, or Courses have previously been activated for the new Program Year, these fields will be nullified with a dropdown selection to choose a different Instructor, Location, or Course. All other information should be updated as needed.